Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_

Financial Planning Checklist

**Use the following checklist and point scale to as a guide when completing your report.**

**ASVAB Results**: Attach ASVAB results and interest inventory with report!

Career Option 1:

Career utilizes Top 3 Interest Codes \_\_\_\_\_\_\_\_\_ (5)

Career is congruent with Skills Ratings \_\_\_\_\_\_\_\_\_ (5)

Career Option 2:

Career utilizes Top 3 Interest Codes \_\_\_\_\_\_\_\_\_ (5)

Career is congruent with Skills Ratings \_\_\_\_\_\_\_\_\_ (5)

**Career Research:** Attach research and works cited with report!

Career Option 1:

Annual Median Income \_\_\_\_\_\_\_\_\_ (5)

Required Education \_\_\_\_\_\_\_\_\_ (5)

Career Option 2:

Annual Median Income \_\_\_\_\_\_\_\_\_ (5)

Required Education \_\_\_\_\_\_\_\_\_ (5)

**Post-Secondary Institution Research:** Attach research and works cited with report!

Career Option 1:

School of Interest \_\_\_\_\_\_\_\_\_ (5)

(Private College/State University/Other)

Cost of post-secondary education \_\_\_\_\_\_\_\_\_ (10)

Career Option 2:

School of Interest \_\_\_\_\_\_\_\_\_ (5)

(Private College/State University/Other)

Cost of post-secondary education \_\_\_\_\_\_\_\_\_ (10)

**Analysis:** Attach financial resource cards and supporting calculations with report!

Family Contribution and Scholarship:

Annual financial input calculated \_\_\_\_\_\_\_\_\_ (10)

FAFSA interest rate used:

Graduating year interest rate recorded \_\_\_\_\_\_\_\_\_ (5)

Career Option 1:

Loan payoff amount calculated \_\_\_\_\_\_\_\_\_ (10)

Monthly education loan payment calculated \_\_\_\_\_\_\_\_\_ (5)

Payment/Income percentage rate caculated \_\_\_\_\_\_\_\_\_ (5)

Career Option 2:

Loan payoff amount calculated \_\_\_\_\_\_\_\_\_ (10)

Monthly education loan payment calculated \_\_\_\_\_\_\_\_\_ (5)

Payment/Income percentage rate caculated \_\_\_\_\_\_\_\_\_ (5)

**Evaluation:** Include developed assessment and proposed future plan in report!

Comparison

Cost-to-Benefit ratio used in comparison of career options \_\_\_\_\_\_\_\_\_ (10)

Future Plan:

Developed Financial Plan aligned with assessment \_\_\_\_\_\_\_\_\_ (10)

At least two money saving strategies incorporated \_\_\_\_\_\_\_\_\_ (5)

Total: \_\_\_\_\_\_\_\_\_\_\_ / 150 points